



Primary Health Care Management Advancement Programme

ASSESSING THE QUALITY OF MANAGEMENT

**MODULE 7
FACILITATOR'S GUIDE**

THE PHC MAP SERIES OF MODULES, GUIDES AND REFERENCE MATERIALS

Each module includes:

- a User's guide
- a Facilitator's guide
- computer programs

Module 1 Assessing information needs

Module 2 Assessing community health needs and coverage

Module 3 Planning and assessing health worker activities

Module 4 Surveillance of morbidity and mortality

Module 5 Monitoring and evaluating programmes

Module 6 Assessing the quality of service

Module 7 Assessing the quality of management

Module 8 Cost analysis

Module 9 Sustainability analysis

Manager's guides and references

- Better management: 100 tips
- Problem-solving
- Computers
- The computerised PRICOR thesaurus

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THE AGA KHAN UNIVERSITY



AGA KHAN FOUNDATION

Primary Health Care Management Advancement Programme

ASSESSING THE QUALITY OF MANAGEMENT

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University Research Corporation

MODULE 7 FACILITATOR'S GUIDE



Aga Khan Health Services



University Research Corporation
Center for Human Services



ASSESSING
THE QUALITY
OF MANAGEMENT

with case
studies and exercises

MODULE 2
TECHNIQUES

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*Dedicated to
Dr. Duane L. Smith (1939-1992) ,
Dr. William E. Steeler (1948-1992)
and all other health leaders, managers and workers
who follow their example in the effort to bring quality health
care to all in need.*



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Foreword

What is the purpose of the Facilitator's guide?

The Facilitator's guide contains a suggested workshop design for use by individuals who will help PHC managers and staff learn how to use the Primary Health Care Management Advancement Programme (PHC MAP) series. There is a Facilitator's guide for each module in the PHC MAP series.

What information does it contain?

Each Facilitator's guide contains instructions for conducting a workshop on one of the modules in the PHC MAP series using the information contained in the User's guide.

The instructions are arranged in one to two hour sessions. The number of sessions depends on the amount of information and/or the number of steps contained in the User's guide. The first page of each session lists session objectives, major topic headings, time required, and materials and equipment. The following pages describe the instructional activities in outline form.

The outline is divided into two columns. The right-hand column indicates what the facilitator says or does to conduct the session. The left-hand column lists the handouts, overhead transparencies, or other materials needed to support the activity. Copies of these materials, suitable for duplication, appear at the end of the session in which they are first used. Some transparencies are used in more than one session.

How are the workshops organised?

The first session of each workshop contains activities designed to introduce the PHC MAP series and explain its importance to PHC programmes, present an overview of the workshop, explain the purpose of the module, review specific terms or concepts used in the module, and



acquaint the participants with the organisation and content of the User's guide.

The final session of each workshop contains activities designed to review key points of the User's guide, if appropriate, help participants prepare an action plan, and brings the workshop to a formal conclusion. The sessions in between present the steps required to accomplish the purpose of the module and provide an opportunity for participants to apply those steps to their own programmes.

Each workshop is designed to be given on consecutive days, uninterrupted except for breaks, meals, and rest, if the workshop is longer than one day. It is recognised, however, that situations vary and the PHC MAP modules will be used singly or in combination by individuals and organisations in the field and on university campuses. Therefore, it is expected that the workshops described in the Facilitator's guides will be adapted to fit a range of circumstances. Indeed, those who facilitate PHC MAP workshops are encouraged to make adaptations to meet the needs of participants and/or specific PHC programmes.

Who can be a facilitator?

Ideally, the person who serves as facilitator has training and experience in the fields of public health, management, planning, and evaluation, as well as sampling and survey design. It is recommended that this person also be skilful in working with small groups.

The facilitator should be someone from outside the PHC programme, perhaps from another agency or a university. As a person with no direct interest in the programme, the facilitator can be neutral in disagreements that may arise and help the group members resolve an issue objectively. Having an outside person as facilitator also allows the programme director, who usually has a leadership role, to contribute his or her knowledge and experience as a full participant in the work of the group.

It is also recommended that a facilitator have a full set of PHC MAP User's guides and Facilitator's guides. It is sometimes necessary, in the course of completing one module, to refer to information in another module.

Who should participate in the workshop?

The primary audience for the PHC MAP series is the team that manages PHC programmes or other population-based health programmes in either the public or private sector. An example of a PHC management team in the public sector is the core staff of a district ranging from 100,000 to 300,000 in size of population served.



An example of a PHC management team in the private sector is the core staff of an NGO that provides PHC services to a specific population in a given geographic area. The average size of the service population may range from 40,000 to 60,000, but may be as small as 10,000 or more than 100,000. In either case, the management team should have:

- the knowledge and skills needed to complete the steps in the module
- the time and resources required to collect and analyse the required data
- the authority to plan and implement improvements in management systems and procedures based on this analysis.

If feasible, teams from several districts or from several PHC programmes within a given NGO, may work simultaneously with one facilitator to complete a module. It is recommended that one facilitator work with no more than four teams or 20 people at one time.

What does the facilitator do?

Understands the needs of participants. If the facilitator is working with one PHC programme, the most efficient way to gather information about participants and the programme in which they work is to meet with the PHC director to determine:

- the nature of the PHC programme (services provided, size and description of area served, number and type of facilities, number and qualifications of staff, community involvement, computer capability, strengths, major problems, etc.)
- if information needs have been clearly identified
- previous staff training in management information systems or related topics
- resources available for training (time, space, equipment)
- possibility for subsequent technical assistance to workshop participants.

Understands the content of Module 1. Read the User's guide and Facilitator's guide for Module 1 and consider options for workshop delivery.

- The purpose of Module 1 is to help participants select priority information needs and to review some basic concepts underlying management information systems. Depending on participant background, the amount of time available, and the need to establish priorities among management information needs, Module 1 can be presented in its entirety, limited to Level 1: Quick start, limited to the PHC MAP systems framework, or in



summary form as contained in the first session of the Facilitator's guides for Modules 2 through 9.

- If information needs have not been clearly identified and participants have no background in systems, then Module 1 should be presented in full. The selection of the next-module will depend upon priorities set by the participants as they complete the steps in Module 1.
- If information needs have been clearly identified and participants have no background in systems, then that portion of Module 1 can be added to the first session of the selected module.
- If information needs have been clearly identified and participants have a background in systems, then the overview of PHC MAP in the selected module will be sufficient.

Understands the content of the selected module. Read the User's guide and Facilitator's guide for the selected module and consider options for workshop delivery.

- Depending upon the length of the module and the availability of staff for training, the workshop sessions may be presented as described in the Facilitator's guide, or workshop sessions may be delivered at intervals (for example, every morning for a certain number of days, one session per week, or one day per week for three or four weeks).
- If follow-on technical assistance is available, the content of the module could be presented in the workshop and the application of the procedure to the PHC programme could be conducted on the job.
- Participants could plan steps in the workshop, complete them on the job, and bring the results to the next workshop session. This approach is particularly applicable to Module 2 which requires development of a questionnaire, selection of a survey sample, training of data collectors, and data collection. These steps cannot actually be carried out within the time limits of the workshop as contained in the Module 2 Facilitator's guide.
- Other options are possible depending upon the circumstances of each situation.

Determines what programme information, if any, is needed for completion of the module. For example, census data and lists of households are required to complete some of the steps in Module 3.



Determines the most appropriate people to attend the workshop. For example, Module 7 is best completed by those responsible for planning, training, supervision, logistics, and other management services.

Discusses the delivery options and participants with the PHC manager and make decisions regarding the most appropriate option and participant selection. Also determines if the needed information is available and if it is not, the alternatives for obtaining the information.

Notifies participants of the date, time, and purpose of the workshop and confirms attendance. Initial notice of the meeting may come from the PHC manager, with follow-up by the facilitator.

Prepares the agenda, using as a model the sample in Session 1 of the Facilitator's guide for the selected module.

Inspects the room where the workshop will be held and answers these questions:

- Is the room large enough to seat all the participants?
- Can chairs and tables be arranged in a variety of ways; all participants around one table; participants in groups of three or four at smaller tables?
- Is the lighting adequate?
- Can temperature and humidity be controlled?
- Is there an electrical outlet for an overhead projector?
- Is a microphone necessary for everyone to hear and to be heard?
- Are toilets conveniently located?
- Is the site convenient to parking, restaurants and public transportation?
- Are supporting facilities available and convenient: duplication, word processing, computers?

Prepares notes to conduct the workshop using the session outlines in the Facilitator's guide for the selected module, and makes the necessary adaptations. Refer to the appropriate User's guide for content.

Duplicates the worksheets and other handouts as indicated in the Facilitator's guide and obtains the necessary equipment.

Conducts the workshop as planned.

Provides follow-on assistance, if appropriate.



Session 1: Introduction and overview

- Objectives:** Participants will be able to:
- Explain at least one purpose of Module 7
 - Describe how checklists and discussion guidelines are used in management assessment.
- Session outline:**
- I. Introduction (30 minutes)
 - II. Overview of workshop (10 minutes)
 - III. Purpose of Module 7 (10 minutes)
 - IV. Module 7 User's guide (25 minutes)
- Materials:**
- Module 7 User's guide
- Handout 7-1: Agenda
 - Transparency 7-1: Workshop objectives
 - Transparency 7-2: Purpose of Module 7
 - Transparency 7-3: PHC management functions
 - Transparency 7-4: Steps in management assessment
- Equipment:** Flipchart, stand, markers, masking tape, overhead projector and screen



Session 1: Introduction and overview

I. Introduction

Note: Omit Section I if you have presented Module 1, or some other module, immediately prior to the presentation of Module 7.

A. OPENING REMARKS

- **Introduce** self and other staff, as necessary.
- **Explain** your role in the workshop.
- If you do not know the participants, **ask** each one to state his or her name, position, title, and job location.

Note: If the group is larger than 6 or 8, you may wish to have them wear name tags or place cards with their names at places where they are sitting.

- **Ask** each participant to complete this sentence: "As a result of attending this workshop, I expect..." and **write** their responses on the flipchart.
- When all responses have been recorded, **say** that you will return to this list after giving an overview of the workshop.

B. OVERVIEW OF PHC MAP

- **Explain** why information is important for PHC programmes.
- **Summarise** PHC MAP programme, including:
 - Purpose of PHC MAP.
 - Title and purpose of each module and other materials.
- **Make** the following points about PHC MAP:
 - Has been field tested and revised to ensure usefulness to PHC programme staff.

Name tags
or place cards

Flip chart

See Module 1 User's
guide for this information



Session 1: Introduction and overview

Modules can be used in any sequence.

Checklists and other materials can, and should, be adapted to fit a particular situation.

The procedures outlined in the modules can be adopted as routine monitoring activities in a PHC programme.

- **Explain** why MAP is being introduced in this PHC programme.

Note: *The remarks here should be tailored to the specific programme and should provide the answers to these questions:*

Why are we doing this workshop?

What do we expect to achieve?

It may be appropriate for the PHC manager to make these remarks.

II. Overview of workshop

Transparency 7-1:
Workshop objectives

Handout 7-1: Agenda

- **Review** the workshop objectives.
- **Distribute** and **review** the workshop agenda, describing the activities that will take place to accomplish the workshop objectives.
- **Review** the expectations contributed by participants at the beginning of the session.
Indicate which ones will be met and which ones will not and why.
Suggest, if possible, alternatives for meeting the expectations that will not be met in this workshop.
- **Ask** for questions or comments.

III. Purposes of module 7

Transparency 7-2:
Purposes of Module 7

- **Explain** that the purposes of Module 7 are to help PHC management staff:



Session 1: Introduction and overview

Assess the strengths and weaknesses of PHC management functions in their programme.

Identify causes of problems and find effective solutions.

Transparency 7-3: PHC management functions

- **Review** the eight management functions and **discuss** briefly what is involved in each function.

***Note:** Use the information on pages 9-13 in the User's guide. Do not mention the checklists or guidelines at this time.*

IV. Module 7 User's guide

Module 7 User's guide

- **Distribute** a User's guide to each participant.
- **Refer** participants to Appendix B and explain the organization and content of the checklist for planning, making the points included on pages 7-8 in the introduction to the User's guide.
- **Direct** participants to glance through the other checklists in Appendix B.
- **Refer** participants to Appendix A, page 35, and explain the purpose and content of the discussion guidelines, using the points contained on page 9.
- **Describe** the relationship between checklists and discussion guidelines as management assessment tools.
- **Direct** participants to glance through the other discussion guidelines in Appendix A.
- **Ask** for questions and comments on checklists and guidelines.



Session 1: Introduction and overview

Transparency 7-4: Steps in management assessment

- **Discuss** the strengths and limitations of Module 7 as described on page 17 of the User's guide.
- **Refer** participants to page 19 where the management assessment procedure begins.
- **Review** briefly the steps in management assessment and **explain** that Session 2 will be devoted to Step 1.



SAMPLE AGENDA MODULE 7*

Session 1 (1 hr, 15 mins)	Introduction and overview
Session 2 (1 hr, 20 mins)	Specify management assessment objectives (Step 1)
Session 3 (1 hr, 30 mins)	Design and carry out assessment (Steps 2, 3 and 4)
Session 4 (1 hr)	Review results (Step 5 and 6)
Session 5 (1 hr, 5 mins)	Take action and check results (Step 7 and 8)

* For an actual presentation, substitute the appropriate times in the first column



WORKSHOP OBJECTIVES

1. Conduct a management assessment for one PHC management function using the steps and materials contained in Module 7
2. Prepare a list of action steps to assess other management functions after the workshop using the same steps and materials



PURPOSES OF MODULE 7

To help PHC managers to:

1. assess strengths and weaknesses of PHC management functions
2. identify causes of problems and find effective solutions



PHC MANAGEMENT FUNCTIONS

- Planning
- Personnel management
- Training
- Supervision
- Financial management
- Logistics management
- Information management
- Community organisation



STEPS IN MANAGEMENT ASSESSMENT

1. Specify the objectives
2. Determine assessment methods
3. Select and adapt appropriate checklists or guidelines
4. Carry out the assessment
5. Review preliminary results
6. Analyse the management process
7. Take action to improve management
8. Check results



Session 2: Specify management assessment objectives (Step 1)

Objectives:	Participants will be able to follow the directions in the Module 7 User's guide to specify the objectives of a management assessment for their PHC programme
Session outline:	<ul style="list-style-type: none">I. Introduction (5 minutes)II. Questions to be Addressed (15 minutes)III. Application (1 hour)
Materials:	<ul style="list-style-type: none">Module 7 User's guideTransparency 7-5: Session 2: ObjectivesTransparency 7-6: Questions to be answeredHandout 7-2: Worksheet for planning management assessment
Equipment:	Flipchart, stand, markers, masking tape, overhead projector and screen



Session : Specify management assessment objectives (Step 1)

I. Introduction

Transparency 7-5:
Session 2: Objectives

- **Review** the session objectives.
- **Explain** that you will introduce and discuss the questions to be answered in specifying assessment objectives, after which participants will answer those questions to plan their own management assessment.

II. Questions to be answered

Transparency 7-6:
Questions to be answered

- **Explain** that assessment objectives are specified by answering a series of questions.
- **Show** one question at a time and **discuss** the purpose of each and possible responses, using the points contained on pages 19-21.
- **Encourage** participants to ask questions and give examples from their programmes as you present each question.

III. Application

Handout 7-2: Worksheet
for planning

- **Distribute** the worksheet and **direct** participants to complete Step 1 for their PHC programme.

Note: If it will not be possible to actually collect data during the workshop, direct participants to choose a management function for assessment, such as planning, that they are most familiar with and that requires more qualitative than quantitative data.



Session 2: Specify management assessment objectives (Step 1)

- When participants have completed the worksheet for Step 1, **ask** one participant to present the responses developed by the group and explain the rationale for each response.

Note: As you listen to the presentation, consider whether the responses are consistent with the purpose of each question and consistent with each other and the needs of the programme. For example:

Are the units to be studied consistent with the purpose of the assessment?

Does the scope of the assessment exceed the resources available?

- **Ask** for questions and comments about the worksheet and the process of specifying the assessment objectives.



SESSION 2: OBJECTIVE

Specify the objectives of management assessment for your PHC programme



QUESTIONS TO BE ANSWERED

- What is purpose?
- What activities included?
- Who will use information?
- How will information be used?
- What is the unit of study?
- Length of time?
- Do we have the resources?



WORKSHEET FOR PLANNING MANAGEMENT ASSESSMENT

STEP 1: Specify the objectives of the assessment

A. What is the purpose of the assessment?:

B. What is the scope of the assessment?

Management activity(ies):

Sub-tasks:

C. Who will use the information gathered?

D. How will the information be used?

E. What programmes or facilities (units) will be covered?

F. Over what period of time will the activities take place?

G. Are resources adequate?



WORKSHEET FOR PLANNING MANAGEMENT ASSESSMENT

STEP 2: Determine assessment methods

Unit of observation

Data sources

Sampling methods

STEP 3: Choose relevant checklists:

Modification required:

Session 3: Design and carry out assessment (Steps 2, 3 and 4)

Objectives:	<p>Participants will be able to follow the directions in the Module 7 User's guide to:</p> <ul style="list-style-type: none"> • Determine assessment methods. • Select and adapt checklists or guidelines. • Carry out the assessment.
Session outline:	<ol style="list-style-type: none"> I. Introduction (5 minutes) II. Determine assessment methods (10 minutes) III. Select and adapt checklists or guidelines (30 minutes) IV. Carry out the assessment (45 minutes)
Materials:	<p>Module 7 User's guide</p> <p>Transparency 7-7: Session 3 objectives</p> <p>Transparency 7-8: Other assessment methods</p> <p>Transparency 7-9: Selecting information methods</p> <p>Transparency 7-10: Ground rules</p>
Equipment	<p>Flipchart, stand, markers, masking tape, overhead projector and screen</p>



Session 3: Design and carry out assessment (Steps 2, 3 and 4)

I. Introduction

Transparency 7-7:
Session 3: Objectives

- **Review** session objectives.
- **Explain** that details regarding each of the three steps will be discussed and that the major portion of the time will be spent in a group discussion focused on the management function chosen in Step 1.

II. Determine assessment methods

APPROACHES TO MANAGEMENT ASSESSMENT:

- **Remind** participants that this module presents quantitative and qualitative approaches to management assessment.
- **Say** that the quantitative approach emphasizes the use of the checklists contained in Appendix B; the qualitative approach emphasizes use of the discussion guidelines contained in Appendix A.
- **Make** these additional points regarding approaches to management assessment:
 - Both checklists and guidelines can be used by the management team.
 - Both also can be adapted for use in the field.
 - Briefly **review** other assessment methods that can be used in the field.
 - Briefly **review** factors to consider in selecting assessment methods.
- **Refer** participants to their responses to questions on Step 1 of the Worksheet for planning management assessment for the management activities or subtasks (functions) they selected for assessment.

Transparency 7-8: Other
assessment methods

Transparency 7-9:
Selecting information
methods



Session 3: Design and carry out assessment (Steps 2, 3 and 4)

III. Select and adapt appropriate checklist or guidelines

User's guide

- **Refer** participants to Appendix A to find the guidelines appropriate to the management activity they chose to assess.
- **Direct** participants to review the questions under the section headed "Discussion guidelines" and "Key questions."
- **Point out** that the "Key questions" have been extracted from the corresponding checklist for this activity and are phrased to be answered yes or no.
- **Direct** participants to find the corresponding checklist in Appendix B and, if they wish, select other key questions they would like to address in the group discussion.
- Next, **ask** participants to rephrase the key questions so that they cannot be answered yes or no. **Record** the rephrased questions on a flipchart.

Note: The questions under "Discussion guidelines" can serve as a model for rephrasing the key questions.

Questions that begin with "how" or "how well," "when," "why," and "what" are called open-ended questions and require more than a "yes" or "no" response.

Open-ended questions stimulate discussion and promote exploring questions rather than making judgements.



Session 3: Design and carry out assessment (Steps 2, 3 and 4)

IV. Carry out the assessment

Transparency 7-10:
Ground rules

- **Review** the ground rules for a group discussion and **explain** their value in making the **discussion** as productive as possible.

- **Explain** the procedure for the group discussion:

You will take the role of facilitator, reminding the group of the ground rules when they are broken, pointing out when the discussion is off the subject, and announcing the time at various points so participants can adjust the process as needed.

The group will select a leader and a recorder. The leader will chair the discussion using the guidelines as provided or modified. The recorder will write down the group conclusions to each question including minority opinions where applicable.

- **Facilitate** the discussion for no longer than 30 minutes.
- At the end of the discussion, **direct** the recorder to read aloud the conclusions of the group to each question and make agreed upon modifications.
- **Summarise** the group performance on the ground rules, including things they did well and areas where they need to improve.



SESSION 3: OBJECTIVES

- Determine assessment methods
- Select and adapt checklists or guidelines
- Carry out assessment



OTHER ASSESSMENT METHODS

- Observation of job performance
- Health facility inspection
- Record review
- Interview/survey



SELECTING INFORMATION METHODS

Consider:

- Reliability of information
- Time required
- Cost



GROUND RULES

- Everyone's ideas are important
- No "right" or "wrong" answers
- Positive and negative comments
- Disagreement is expected/encouraged
- Don't wait to be called on
- Only one person speaks at a time



Session 4: Review results (Steps 5 and 6)

- Objectives:** Participants will be able to follow the directions in the Module 7 User's guide to:
- Present and review preliminary results with the assessment team.
 - Use at least one analytical technique to determine the cause of a problem identified in the management assessment.
- Session outline:**
- I. Introduction (5 minutes)
 - II. Reviewing results (10 minutes)
 - III. Problem analysis (45 minutes)
- Materials:**
- Module 7 User's guide
 - Transparency 7-11: Session 4: Objectives
 - Transparency 7-12: Reviewing results
 - Transparency 7-13: Analytic techniques
- Equipment:** Flipchart, stand, markers, masking tape, overhead projector and screen



Session 4: Review results (Steps 5 and 6)

I. Introduction

Transparency 7-11:
Session 4: Objectives

- **Review** session objectives.
- **Explain** that in this session, participants will review assessment results to determine problem areas and then analyse one problem to identify the root cause of the problem.

II. Reviewing results

Transparency 7-12:
Reviewing results

Flip chart

- **Refer** participants to the Notes from their group discussion in the previous session.
- **Explain** the review questions and **direct** participants to review their discussion Notes with these questions in mind and to list the easy problems, the priority problems, and the difficult problems.
- As participants classify the problems into categories, **record** them on three separate flipchart pages headed "easy," "difficult," and "priority."
- **Explain** that they will return to the lists after hearing about some techniques for analyzing problems to identify root causes.

III. Analytic techniques

- **State** the value of these and similar analytic techniques:
Provide a framework for examining problems that have multiple causes or have a cause that is not immediately obvious.
Draw on the experience and insight of all staff involved in the process.



Session 4: Review results (Steps 5 and 6)

Transparency 7-13:
Analytic techniques

Lead to the root cause so that the action taken will solve the problem, rather than treat the symptoms.

- **Explain** each technique and **answer** participant questions.

Note: Include the information contained in pages 30-31 in the User's guide in your explanation.

The 5 whys

The fishbone diagram

Note: Refer participants to page 31 (Exhibit 6) for an example of a completed fishbone diagram.

Process flow chart

Note: Refer participants to page 33 (Exhibit 7) for an example of completed process flow chart.

Flip chart

- **Direct** participants to select one problem from their flipchart list of hard-to-correct problems on the flipchart that they would like to analyse further.
- **Ask** them to analyse it using one of the techniques just presented.

Assist them in selecting a technique by suggesting that the process flow chart is most suitable for a process problem, such as one related to logistics.

The fishbone diagram works best for problems that may have multiple causes that can be classified under larger headings as shown in the example.

The **5 whys** can be used alone and is often helpful after the fishbone diagram has revealed a number of possible causes and the group, based on its experience, has selected the most likely cause or causes.

Facilitate the application of the selected technique by recording the results of the



Session 4: Review results (Steps 5 and 6)

analysis on a flipchart as the group works, or invite a participant to serve that role for the group.

Note: *The analysis will be successful if the group uncovers a cause for the problem that was not immediately apparent or gains insights that guide them to further analysis or additional data collection.*

- If time permits, **direct** the group to choose a second problem for analysis.
- **Ask** for questions and comments about analysis techniques, particularly the one they used.



SESSION 4: OBJECTIVES

- Present and review results
- Use an analytical technique to determine cause of a problem



REVIEWING RESULTS

- What activities are going well
- What activities need improvement
- Of the problem activities, which are:
 - Easy to correct
 - A priority
 - Hard to correct



ANALYTIC TECHNIQUES

- The 5 whys
- Fishbone diagram
- Process flow chart



Session 5: Take action and check results (Steps 7 and 8)

- Objectives:** Participants will be able to follow the directions in the Module 7 User's guide to:
- Describe how to take action necessary to implement an appropriate, effective, and acceptable solution.
 - Check the results of that action.
- Session outline:**
- I. Introduction (5 minutes)
 - II. Taking action and checking results (15 minutes)
 - III. Next Steps (30 minutes)
 - IV. Conclusion (15 minutes)
- Materials:**
- Module 7 User's guide
 - Transparency 7-14: Session 5: Objectives
 - Transparency 7-15: Take action and check
 - Transparency 7-16: Other uses of Module 7
- Equipment:** Flipchart, stand, markers, masking tape, over-head projector and screen



Session 5: Take action and check results (Steps 7 and 8)

I. Introduction

Transparency 7-14:
Session 5: Objectives

- **Review** session objectives.
- **Say** that the final activity of the session will give participants an opportunity to think about and list the actions they will need to take after the workshop to continue the work they have begun on assessing and improving the management functions of their PHC programme.

II. Take action and check results

Transparency 7-15: Take
action and check

- **Explain** the process involved in the last two steps of the process of assessing PHC management functions.
- **Refer** participants to the PHC MAP Problem-solving guide and the PRICOR Operations Research manuals for additional ideas and guidelines for completing these last two steps.
- **Ask** for questions and comments on the management assessment process.
- **Discuss** other ways that PHC managers could use these steps and materials in Module 7 to improve their management functions.

Transparency 7-16: Other
uses of Module 7

Note: Include the information contained on pages 4 and 5 in the User's guide in the discussion.

- **Ask** participants which of the other uses for the checklists they think would be most useful in their programme.



Session 5: Take action and check results (Steps 7 and 8)

III. Next steps

Transparency 7-4:
Steps in management
assessment

Flipchart of problems
from Session 4

- **Review** the steps in management assessment, highlighting the outcome of each step.
- **Direct** participants to review their completed worksheet, the notes from the group discussion, and the lists of problems on the flipcharts and indicate where they need to take action to:
 - Assess other management functions;
 - Take action on easy-to-correct and priority problems;
 - Conduct analyses of hard-to-correct problems; and
 - Implement and check solutions that have been identified.
- **Direct** participants to list what they need to do to implement those actions and then develop an action plan which includes:
 - Tasks in order of accomplishment.
 - When each task must be completed.
 - Who is responsible for each task.
- **Ask** participants to review their action plan, anticipate any problems that might occur, and suggest a way to deal with each problem.
- **Ask** for questions and comments on the action plan.

IV. Conclusion

Flipchart of expectations
from Session 1

- **Review** the expectations participants expressed at the beginning of the workshop and **ask** them to assess how well they think those expectations have been met. If any were not met, **ask** how the workshop could be improved to make that happen.



Session 5: Take action and check results (Steps 7 and 8)

- **Thank** participants for their time and attention, **congratulate** them on the results of their work, and **wish** them good luck in implementing their action plans.

Note: *Indicate what follow-on assistance will be available, if appropriate.*

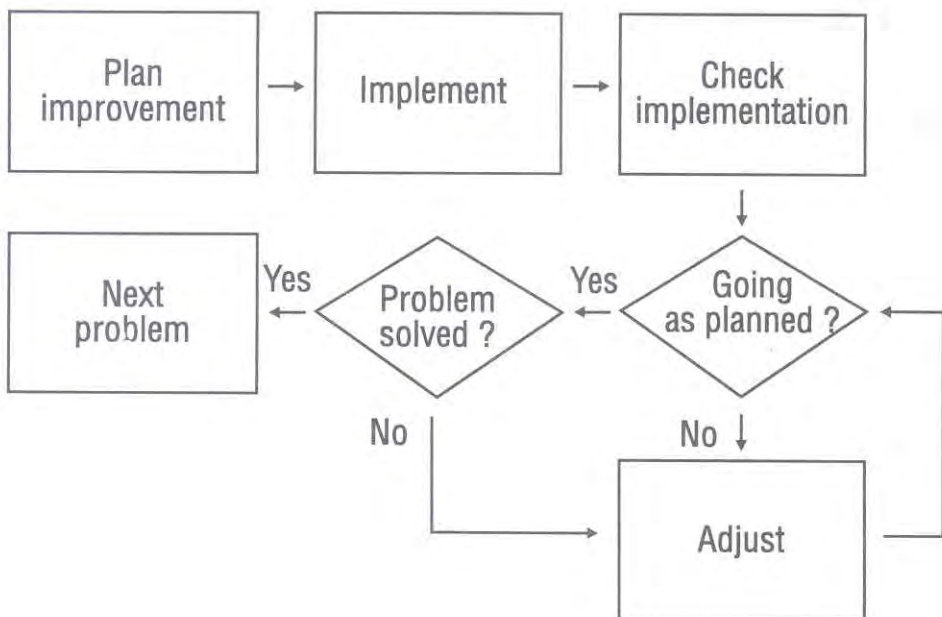


SESSION 5: OBJECTIVES

- Take the action necessary to implement a solution
- Check the results



TAKE ACTION AND CHECK



OTHER USES OF MODULE 7

1. Management evaluation
2. Management team self-assessment
3. Planning new management procedures
4. Monitoring management improvement efforts
5. Job aids
6. Management training



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MODULE 7

FACILITATOR'S GUIDE

